



**Department of Education
Office of Student Financial Assistance**

Front 2 Back Printing and Shipping

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Student Aid Front 2 Back: Printing and Shipping

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Executive Summary

The Student Aid Front 2 Back course is the third course in a series of courses offered by SFA University. The purpose of the course is to help SFA employees and Operating Partners gain a better understanding of the process a student goes through when applying for financial aid, the other “players” in the financial aid industry (Schools, Lenders, Guarantors) and how they interact with one another in support of the student. Additionally, SFA employees and Operating Partners will learn more about the measurements that are being used by SFA to measure and improve how well SFA supports the student financial aid process.

During the design phase of the course, the printing and shipping requirements for the Front 2 Back course were identified. This document illustrates the process followed in selecting a printing and shipping contractor; establishes a list of specific items to be printed and shipped; creates a detailed delivery schedule in order to ensure on time delivery of the course materials; contains both individual class and location specific shipping breakdowns for all course materials; and establishes the roles & responsibilities for the Logistics Host position to support the shipping and printing process.

This document includes:

- Printer Selection
- Printed and Shipped Items
- Site Specific Printing and Shipping Breakdown
- Logistics Host Roles and Responsibilities in the Shipping and Printing Process

Documents described in this executive summary are attached as appendices.



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Printer Selection

As part of a continued effort to uphold high quality standards and decrease the cost of printing materials, Accenture has determined several vendors that are recommended for providing printing and shipping services to our clients. One of these companies, IKON, was utilized for the printing and shipping needs of Student Aid Front 2 Back.

Several factors went into the decision to use IKON including price, accessibility, flexibility, and familiarity with SFA University.

IKON is a full service printer that has offices located across the nation and locally in Springfield, VA. Accenture was able to use its size to negotiate nationwide rates, making IKON a cost effective alternative to other local, regional, or nationwide printers.

Another advantage to using IKON is accessibility. They have account representatives that were able to travel to SFA and meet with Accenture personnel whenever necessary. IKON also proved to be incredibly flexible. They accepted materials in either soft or hard copy format and were able to accommodate every request made during the printing cycle for Student Aid Front 2 Back.

The final factor leading to the selection of IKON was their familiarity with SFA University. IKON preformed printing and shipping duties for SFA University during the second PBO course, Traditions. The resulting familiarity with printing needs and shipping destinations, combined with the high level of service provided in the past, made IKON a logical choice to contract for services with on Student Aid Front 2 Back.

As a result of using IKON printing, all Student Aid Front 2 Back materials were completed and delivered correctly and on time to all ten regional locations as well as in Washington, DC.



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Printed and Shipped Items

The work of the design and development teams resulted in a list of materials that needed to be produced for the Student Aid Front 2 Back course. Each item and a short description are listed below:

- **Instructor Guide:** This guide was handed out to all of the Presenters at the training-of-trainers session. Printed and contained in a 2 ½ " binder, it contains copies of all the power point presentation slides, talking points for the presenters, as well as room to take notes.
- **Participant Guide:** The participant guide is handed out to each person that attends the Student Aid Front 2 Back course. It is spiral bound, has a perforated double-sided evaluation form in the back, and is three-hole punched so that it can be placed in a binder with materials from the previous two trainings in this series.
- **Learning Administrator Guide:** This guide contains instructions on how to handle the "Stop Sign" and "Questions Mark" card questions during the Student's Life Game. It contains both the questions and the correct answers.
- **Life Event Administrator Guide:** This guide contains instructions on how to handle the "Good News!" and "Uh Oh!" card questions during the Student's Life Game. It contains both the questions and the correct answers.
- **Data CD:** In an effort to provide "back-up" materials in a format that was both mobile and easy to use, essential logistics and instructional materials were burned onto Data CD's. The CD's contain all of the items printed by IKON and all other course materials that could possibly need to be recreated at the last minute. Each Logistics Coordinator and Presenter was given a CD during the training-of-trainers session.



Site Specific Printing and Shipping Breakdown

Accenture was able to work with the printer to develop a production and delivery schedule that would ensure the on-time delivery of course materials.

The quantity and materials requirements were determined while final adjustments were being made to document content. Based on this information, an initial printing and shipping schedule was developed, and this information was shared with the development team to help ensure on-time delivery.

A set of core assumptions was used to develop the final printing and shipping schedule. These assumptions were:

- Materials must be delivered to each of the specified locations by Monday, May 14, 2001
- Each course would have a maximum capacity of 30 participants
- One shipment would be made to each location regardless of the number of classes held
- Shipments required tracking

In order to be tracked, it was found that the shipments would need at least three days to arrive at the requested destinations. This information, once combined with the printing time requirements, formed the master printing and shipping schedule. The schedule was then shared with the printer.

Specific instructions were also composed and delivered to the printer with each individual portion of the order. This step was introduced to reinforce printing timeframes and avoid confusion since several items were being printed within the same period of time.

Weekly and daily status reports were established with the printer in order to ensure delivery success and allow for contingency plans to be executed, if necessary.

The following Site Specific Printing and Shipping Breakdown items are included as Appendices A - E:

- Initial Printing Parameters (Appendix A): Based on an initial set of assumptions, an initial printing schedule discussion was held with the printer. From this discussion came a set of initial parameters detailing best and worst case scenarios
- Printing Calendar/Schedule (Appendix B): A calendar detailing the exact day each printing related action must be executed in order to ensure on-time delivery of the training materials
- Item Specific Instructional Cover Memos (Appendix C): Copies of the cover memos that accompanied each individual piece of the printing job when it was sent to IKON for printing
- Data CD Burning Instructions (Appendix D): Specific instructions including which files to be burned, directions for label printing, and where they were to be shipped once completed



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- Delivery Breakdown and Shipping Addresses (Appendix E): Spreadsheet containing both the quantity and shipping destination for each item printed by IKON as well as the addresses for each of the 10 regional destinations



Logistics Host Roles and Responsibilities in the Shipping and Printing Process

During previous PBO courses, problems arose when attempting to ship materials to regional training sessions. Due to the fact that these sessions were being held in hotels, multiple shipments had to be made in order to accommodate the tight time restrictions surrounding the holding of materials (3 days maximum). Additional problems were caused by multiple hotel contacts (catering, booking, and concierge), and last minute presenter/logistics coordinator staffing changes. As a result, it was determined that the ability to receive and secure the shipped items was essential to the overall success of the entire shipping and printing process.

The Logistics Host position was created to:

- Designate one specific person (the Logistics Host) available to receive and secure all shipped items
- Reduce the number of shipments to each training location
- Ensure all necessary items were available to the logistics coordinator prior to each training session
- Hold re-usable items in-between training sessions

The lessons learned from previous PBO courses were used to detail specific roles and responsibilities for the Logistics Host position. Once this process was completed, a set of specific instructions was created and cross-referenced to include all Logistics Hosts and Logistics Coordinators. These instructions were then faxed to each Logistics Host/Logistics Coordinator and then discussed over the phone to ensure clear understanding by everyone involved with the process.

The following Logistics Host items are included as Appendices F and G:

- Roles and Responsibilities (Appendix F): Description of initial assumptions and responsibilities determined for the Logistics Host position
- Specific Instructions (Appendix G): Detailed instructions for each Logistics Host and Logistics Coordinator for each session they are assigned to handle



Appendix A: Initial Printing Parameters



Appendix B: Printing Calendar/Schedule



Appendix C: Item Specific Instructional Cover Memos



Appendix D: Data CD Burning Instructions



Appendix E: Delivery Breakdown and Shipping Addresses



Appendix F: Roles and Responsibilities



Appendix G: Specific Instructions